Background

The Office of the Chief Information Officer, Consolidated Technology Services, and the Department of Natural Resources worked collaboratively to complete a business case analysis for Microsoft Office 365 (O365) in October 2012. The recommendation at that time was that the state should continue using the Shared Services Email (SSE) service and finish migrating remaining agencies to Exchange 2010 and the Symantec Vault.

Since that time, 49 of 53 agencies have completed the move to SSE. The remaining four (4) agencies have migration tasks in progress. This will bring the total number of SSE mailboxes to 65,000. Though Vault migrations have lagged behind, 43 agencies are now using the Vault with 10 additional agencies in the queue.

Shortly following the release of the O365 business case, a decision was made to continue with on-premise solutions for SharePoint and Lync. CTS is in the process of migrating customers to a new SharePoint 2013 environment, and work to implement Lync is currently underway.

It has been 3 years since SSE was first implemented. The original equipment purchase will be fully depreciated by October 2014 and CTS is positioned to begin planning for an upgrade to Exchange 2013.

Business Question

Events have occurred that warrant a re-evaluation of our email strategy. The SSE hardware environment is scheduled to be refreshed, Exchange 2013 is now available, and Microsoft has made functional improvements to the O365 search and archive capabilities. Given these changes, CTS will ask again: Is there a business case at this time to adopt a cloud base solution?

CTS will answer this question by reviewing and building upon the previous O365 business case.

Assumptions

CTS will approach the update using the following assumptions:

- There are no new functional or technical requirements. The previous assessment was completed only a year ago; therefore, the original requirements set are assumed to be relevant.
- Like the original assessment, this review will focus on either an all-cloud solution or an all on-premise solution.
- The technical design for integration with the O365 service, particularly the on-premise infrastructure requirements, is assumed to be still relevant.
- Service functions and features that "passed" the evaluation before pass now.

- Functions and features that "failed" before are an area of focus in the approach below.

Approach

The approach for updating the assessment will address the following areas:

1. Service Offering Comparison – CTS will compare the current Shared Services Email service (Exchange 2010, Symantec Vault, virus checking, spam filtering, SMTP relay, secure email, and ActiveSync) plus on-premise Lync 2013 and SharePoint 2013 to the Office 365 offering.
2. Requirements Gap – Functional testing will focus on the features that "failed" in the previous assessment.
3. Technical Concerns – Technical considerations previously identified as areas of concern, particularly network bandwidth and EAD remediation will be re-evaluated.
4. Financial Comparison – The 5 year total cost of ownership for both solutions will be refreshed and compared.
5. Customer Involvement – CTS will invite customer agencies to participate in pertinent feature set comparisons. Since records retention, retrieval, and case management were issues in the previous assessment, CTS will invite customers with interest in these areas to participate.

Schedule

Complete high level design for an on-premise Exchange 2013 environment for the purpose of developing a cost model – mid December

Begin customer O365 feature evaluation – mid December

Complete collection of raw financial data – end of December

Complete draft assessment – mid January

Complete final assessment – end of January